

**In the claims:**

All of the claims standing for examination are reproduced below for examination.

1. (Currently amended) In a software suite operating on an Internet connected server system for enabling viewing and manipulation of multiple categories of aggregated data compiled from a plurality of ~~data sources~~ Web pages provided by financial institutions and accessible through a single interfacing node operated on the Internet, a portfolio-tracking module having a displayable summary interface comprising:

a proxy server providing automatic navigation to the Web pages for users to log-in and access their stock and investment accounts at the institutions, log-in on behalf of a user, and parsing of the Web site associated with the data sources compiling the data. the software accessing the user's accounts by logging in with the user's password and user name, as if the user, accessing financial information held in the accounts and manipulating the accounts, as if the user;

an interactive main interface accessible through the summary interface, the main interface for listing the stocks and investment accounts for viewing;

an interactive menu provided within the main interface for selecting views of individual investment accounts of the user, the views appearing within the same or within a secondary interface;

an interactive selection interface provided within the main interface for selecting the stock and investment accounts for data tracking;

a first interactive hyperlink embedded within the main interface for linking the main interface to a secondary interface for viewing tracked information about personal investments for the user; and

a second interactive hyperlink embedded within the main interface for linking the main interface to a secondary configuration interface for adding new investment accounts or stocks for tracking on behalf of the user;

characterized in that a user working from within the module ~~may interact~~ interacts

with selected ones of interactive links ~~for the purpose of~~ invoking a variety of secondary interfaces containing more detailed information aggregated from the aggregated data about registered investments, financial accounts, and performance data about stocks and the aggregated data is sourced at least in part from the financial information gathered by the proxy server.

2. (Canceled)

3. (Currently amended) The portfolio-tracking module of claim 1, wherein the plurality of data sources also include services accessible over the Internet and subscribed to by the operating user[.]] requiring the user to log-in with a user name and password in order to access the services and services made available to the public.

4. (Original) The portfolio-tracking module of claim 3, wherein the accessible services are hosted in file servers addressed on the Internet network.

5. (Original) The portfolio-tracking module of claim 4, wherein the remote node is a personal computer with accessibility to the Internet.

6. (Original) The portfolio-tracking module of claim 5, wherein the summary, main and secondary interfaces are provided in the form of hyper-text-markup-language.

7. (Original) The portfolio-tracking module of claim 4, wherein the remote node is a cellular telephone with accessibility to the Internet.

8. (Original) The portfolio-tracking module of claim 4, wherein the remote node is a hand-held computer with accessibility to the Internet.

9. (Original) The portfolio-tracking module of claim 4, wherein the interactive menu

within the main interface contains a selectable list of investment accounts maintained by third-party financial institutions.

10. (Original) The portfolio-tracking module of claim 9, wherein data presented on the summary, main, and any secondary interfaces is updated at time of log-in.

11. (Original) The portfolio-tracking module of claim 10, wherein data presented on the summary, main, and any secondary interfaces is updated periodically at a frequent rate during a session between a user and a server providing the module.

12. (Original) The portfolio-tracking module of claim 10, further comprising an interactive link to an interface for viewing a portion of shared stocks as listed in a particular selected account.

13. (Original) The portfolio-tracking module of claim 11, further comprising a plurality of hyperlinks embedded within the main interface individual ones of the hyperlinks associated with individual ones of entities providing account services, the links causing physical navigation to the associated entity maintaining a selected account.

14. (Currently amended) An interactive portfolio-tracking system for enabling online viewing of itemized investment accounts and stock performance entries belonging to a user tracked across disparate on-line accounts and services over the Internet comprising:

a first server node connected to the network, the server node providing a service-access-point for accessing users;

a second server node connected to the network and accessible to the first server node, the second server node providing automated navigation to Web pages providing access to the user's investment accounts, log-in on behalf of users, logging in with the user's password and user name, as if the user, accessing the user's financial data held in the accounts and manipulating the accounts, as if the user; data procurement, and data

~~aggregation on behalf of the accessing users;~~

~~a plurality of server nodes connected to the network and accessible to the second server node, the server nodes functioning as private and public data sources for the data procurement and aggregation; and~~

a portfolio-tracking software interface installed on the first server node, the interface accessible to the ~~accessing users~~ user connected to the network by respective remote nodes, characterized in that ~~users~~ user accessing the first server node from the remote nodes interact with the portfolio-tracking interface for the purpose of viewing ~~detailed and current~~ the user's financial data according to selected category, the data updated periodically through system update and by result of user request, the user's portfolio data compiled and aggregated by proxy using cooperative functions of the first and second server nodes.

15. (Canceled)

16. (Previously presented) The interactive portfolio-tracking system of claim 14, wherein the first server node is a portal server providing personalized interfaces of the form of hyper-text-markup-language interfaces.

17. (Original) The interactive portfolio-tracking system of claim 16, wherein the on-line accounts and services are accessible over the Internet and are publicly available or subscribed to by the accessing users.

18. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are personal computers with accessibility to the Internet.

19. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are cellular telephones with accessibility to Internet.

20. (Original) The interactive portfolio-tracking system of claim 17, wherein the remote nodes are hand-held computers with accessibility to the Internet.

21. (Original) The interactive portfolio-tracking system of claim 17, wherein the second server node stores aggregated data in a connected data repository held externally from the server.

22. (Original) The interactive portfolio-tracking system of claim 21, wherein the portfolio-tracking software interface is linked to at least one secondary interface provided in the form of hyper-text-markup-language, linking achieved through embedded hyperlinking.

23. (Original) The portfolio-tracking system of claim 22, wherein an interactive menu is accessible from within the portfolio-tracking interface, the menu containing a selectable list of online entities maintaining investment accounts, the accounts including IRAs, money market accounts, and retirement accounts.

24. (Original) The portfolio-tracking system of claim 23, wherein a plurality of hyperlinks are embedded in association with individual ones of the account maintaining entities, the hyperlinks, upon invocation, directing navigation to individual Web-sites hosted by the entities.

25. (Original) The portfolio-tracking system of claim 24, further comprising an interactive link embedded in the main interface to a second interface for viewing a portion of shared stocks as listed in a particular selected account.

26. (Original) The portfolio-tracking system of claim 25, further comprising an interactive link embedded within the main interface of the portfolio-tracking software, the link associated with a secondary interface for viewing updated stock performance data,

the data updated by accessing a public entity and the data enhanced with summary data known about the requesting user.

27. (Original) The portfolio-tracking system of claim 26, wherein the enhancements to the data procured from a public entity include the quantity of shares and total value of shares held of a listed stock displayed in the secondary interface.

28. (Currently amended) A method for tracking and viewing a user's financial portfolio data including stock performance data rendered in an interactive user-interface accessible through the Internet comprising the steps of:

- (a) accessing an interactive portfolio-tracking interface by the user from a remote node connected to the network;

- (b) pre-configuring and selecting accounts and stocks for tracking and viewing, selection ordered by the user through the interface;

- (c) submitting the pre-configured and selected account and stock data, the data used as criteria for service;

- (d) navigating automatically by a server node to Web sites providing a log-in page to user's to access [[to]] the user's accounts and stock performance data, logging in with the user's password and user name, as if the user on behalf of users, procuring the user's account and stock performance data as if the user and performing data aggregation on behalf of the accessing users; and

- (e) viewing the resulting displays of tracked and rendered account and stock data.

29. (Canceled)

30. (Previously presented) The method of claim 28 wherein in step (a), the interactive portfolio-tracking interface is a personalized hyper-text-markup-language interface served by a portal server connected to the network.

31. (Original) The method of claim 30 wherein in step (a), the remote node is a personal computer with accessibility to the network.
32. (Previously presented) The method of claim 28 wherein in step (a), the remote node is a cellular telephone with accessibility to the network.
33. (Previously presented) The method of claim 28 wherein in step (a), the remote node is a hand-held computer with accessibility to the network.